

## BACKGROUND:

- ❑ We surveyed 1,500 US consumers balanced to census to scope grocers, grocery delivery, and meal kits.

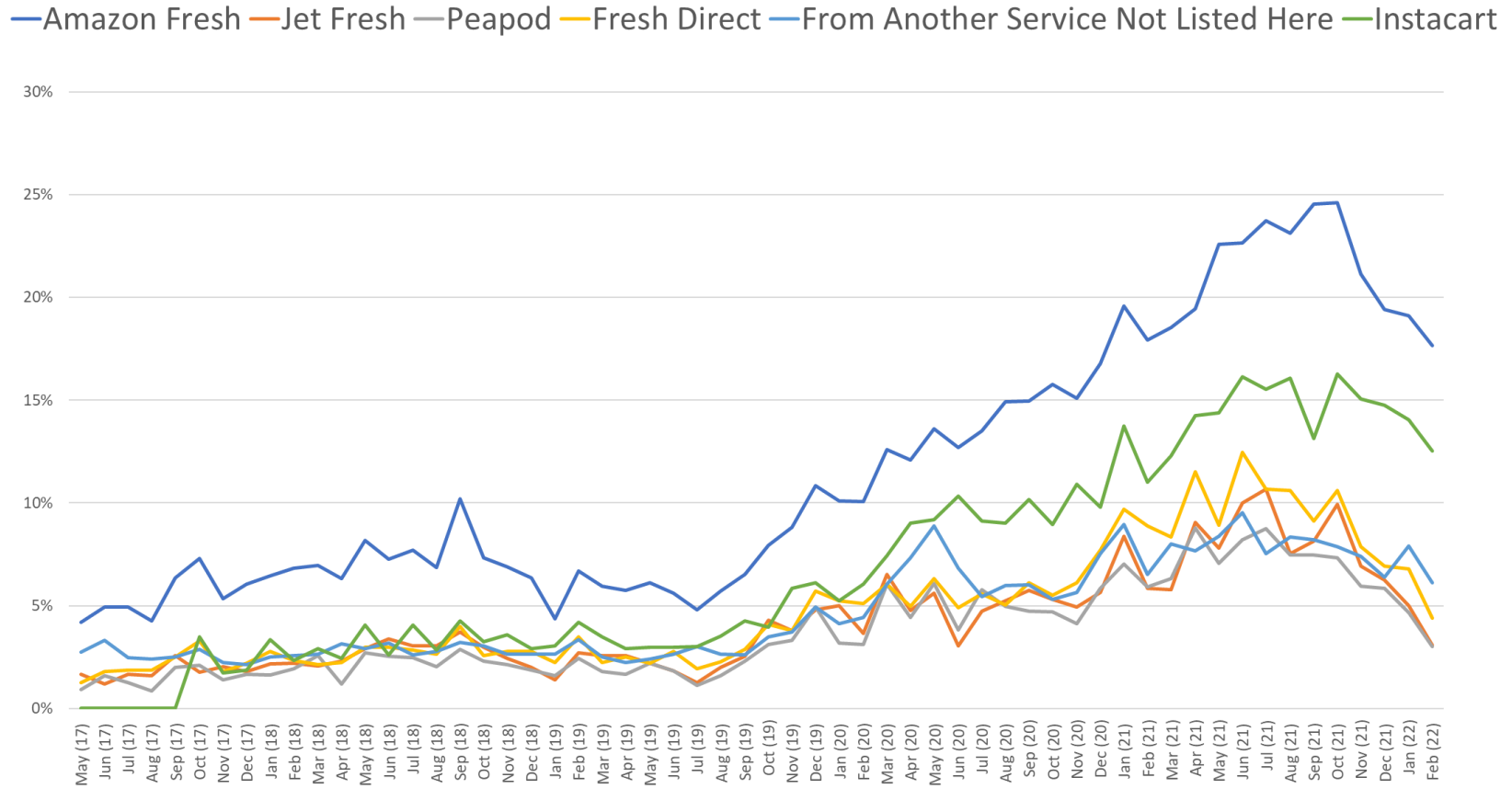
## FINDINGS:

- ❑ Self-reported online grocery ordering has softened sequentially from pandemic highs.
- ❑ Similar to online grocery delivery, self-reported meal kits ordering tracking data softened into the start of this year.
- ❑ In addition to a softening in consumers self-reporting usage of online grocery services, sentiment toward ordering groceries online has pulled back sequentially from series bests set during the pandemic.
- ❑ Visits to grocery stores in person has increased sequentially in our current volume. Retailers like Wal-Mart, Target, Aldi, and Costco have seen improvement.



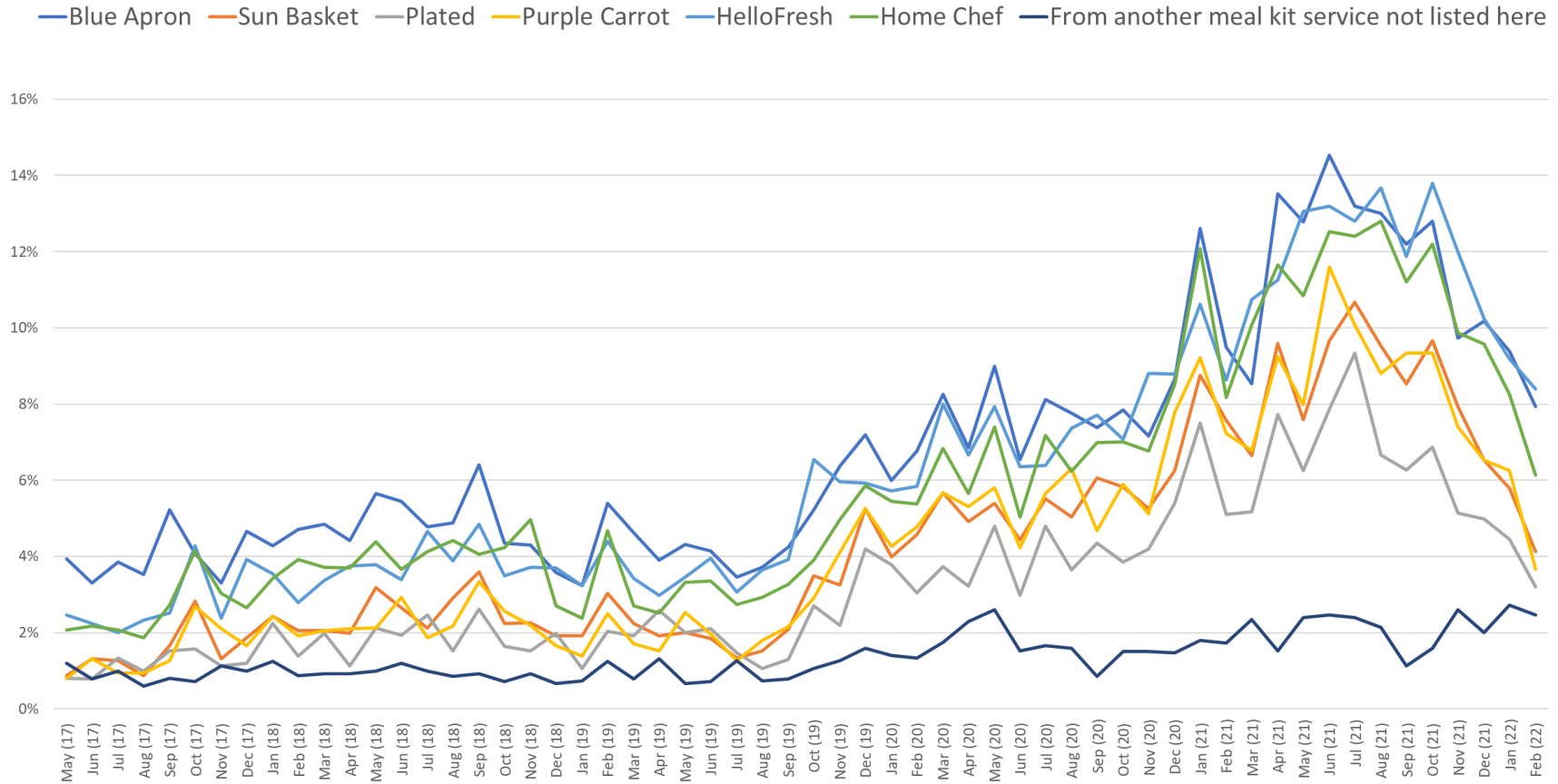
### Have you gotten groceries delivered in the past month from any of the following?

*Posed to all respondents.*



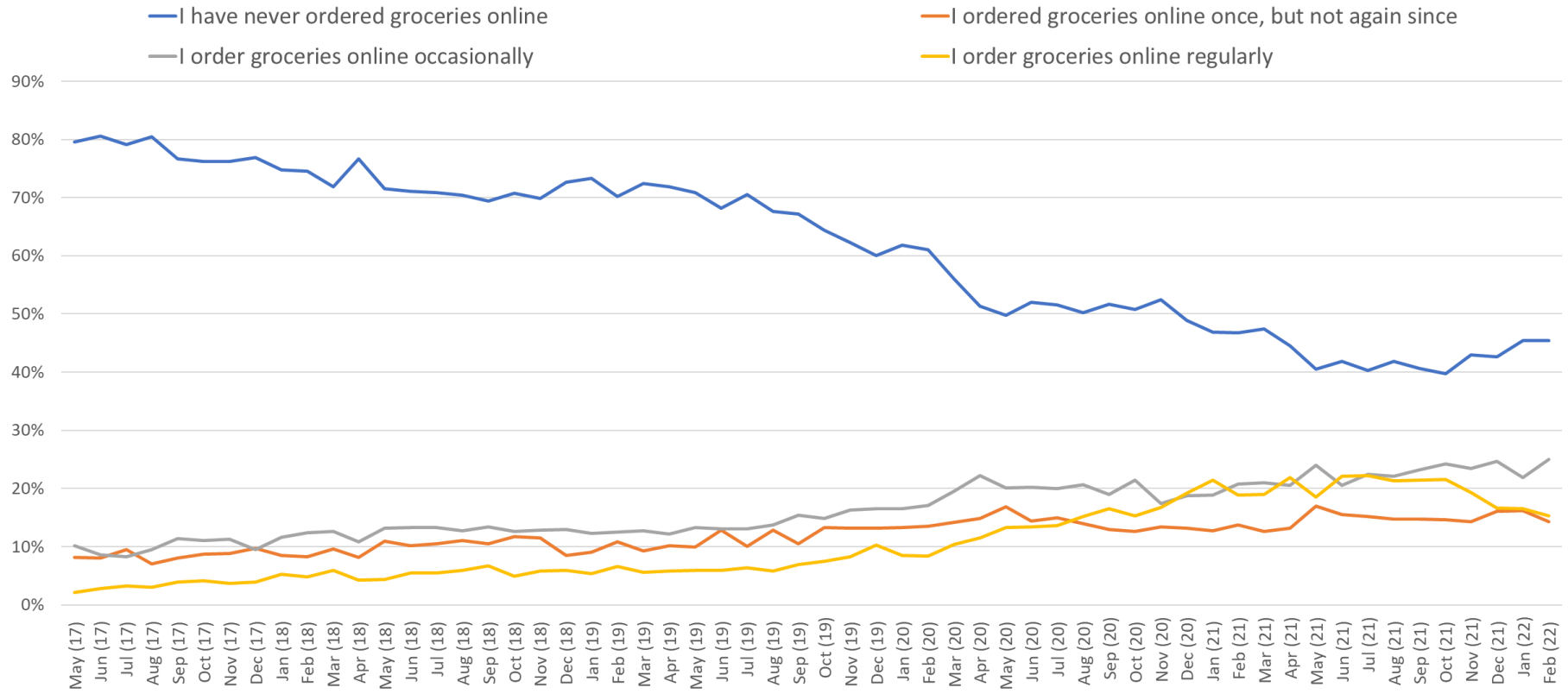
### Have you gotten meal kits delivered from any of the following in the past month?

*Posed to all respondents.*

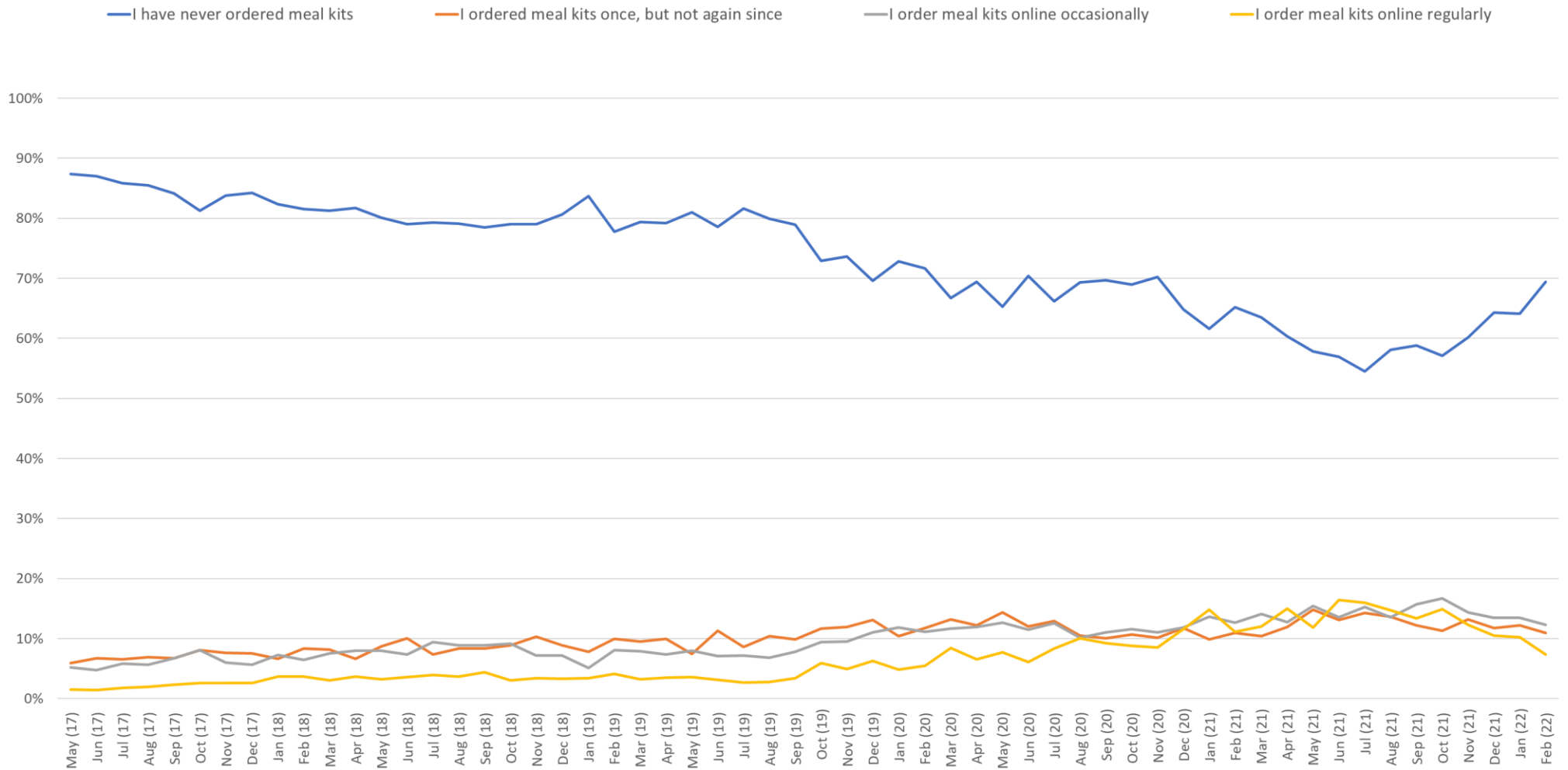


**Please characterize your experience with ordering groceries online:**

*Posed to all respondents.*

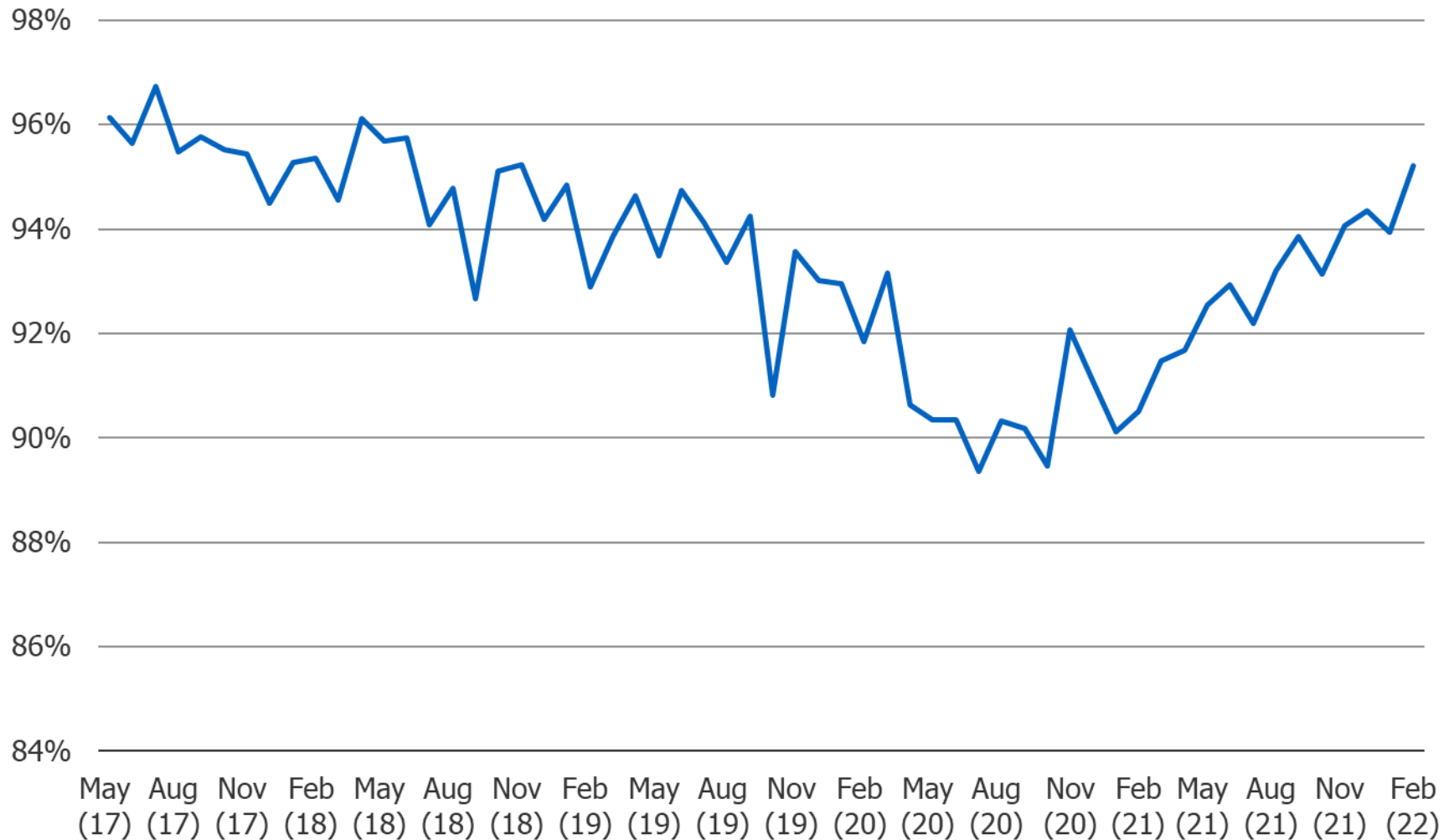


**Please characterize your experience with ordering meal kits online:**  
*Posed to all respondents.*

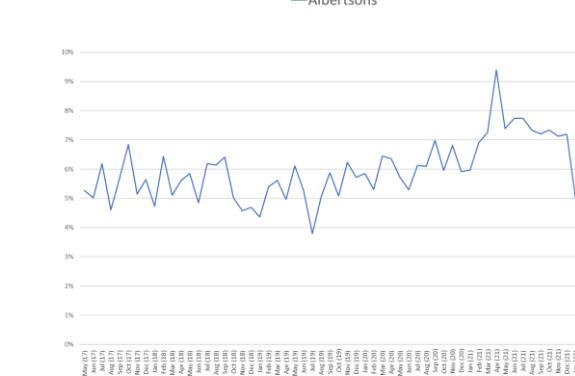
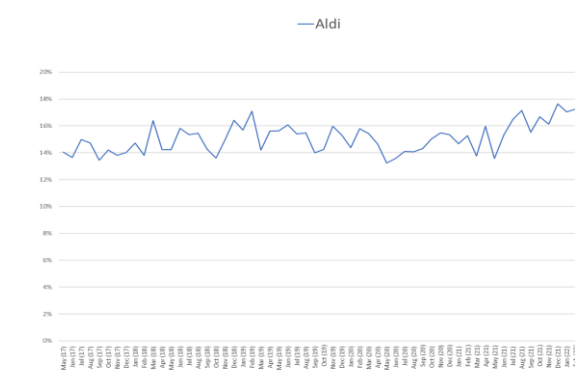
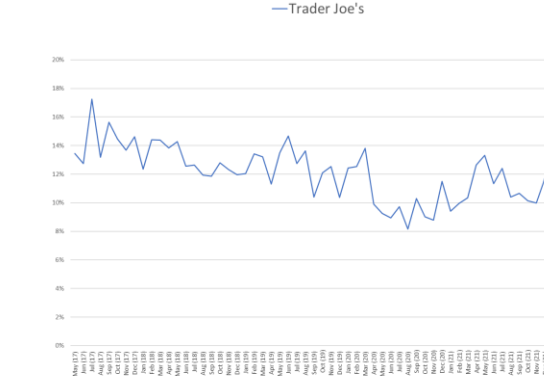
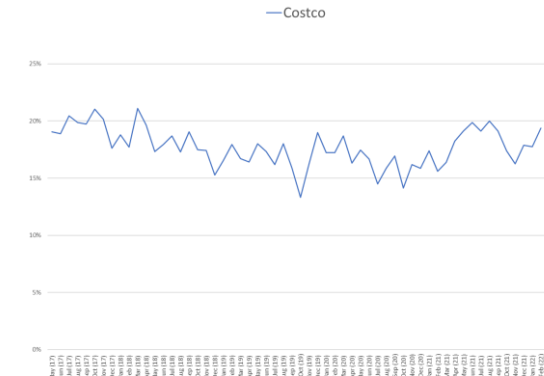
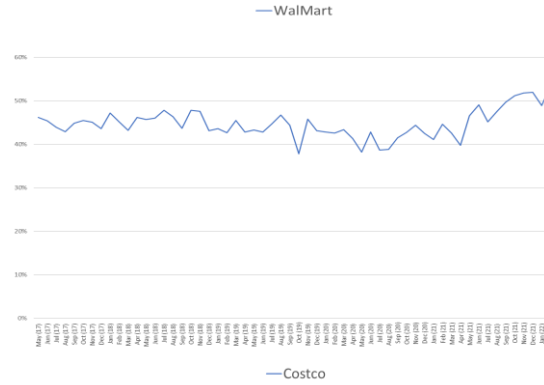
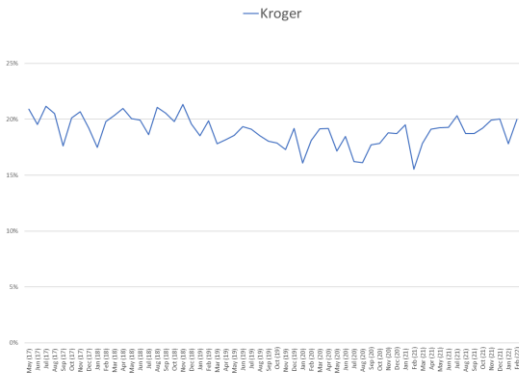


**% Visited a grocery store in the past month**

*Posed to all respondents.*



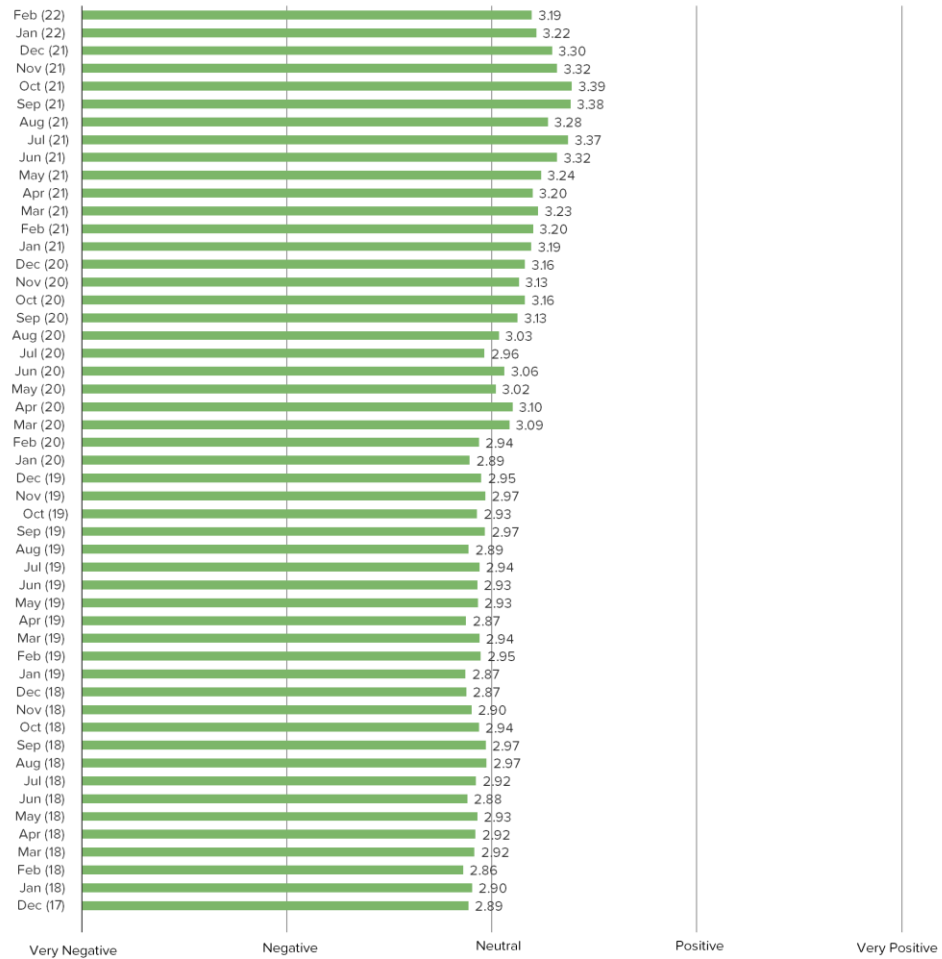
# Have you visited any of the following in the past month for groceries or grocery related items? Posed to all respondents.



**In general, how do you feel about the thought of ordering groceries online?**

*Posed to all respondents.*

Weighted Average

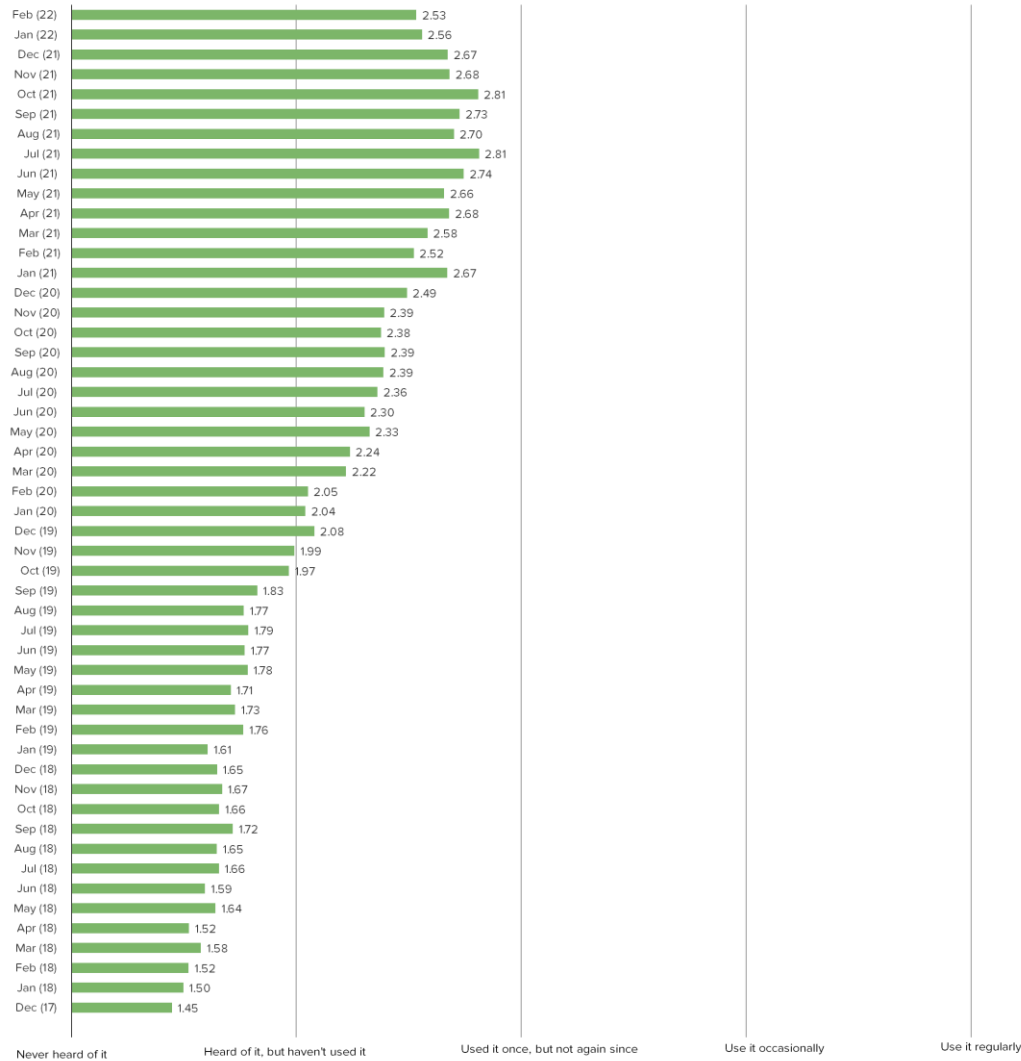




# What is your familiarity with Instacart?

*Posed to all respondents.*

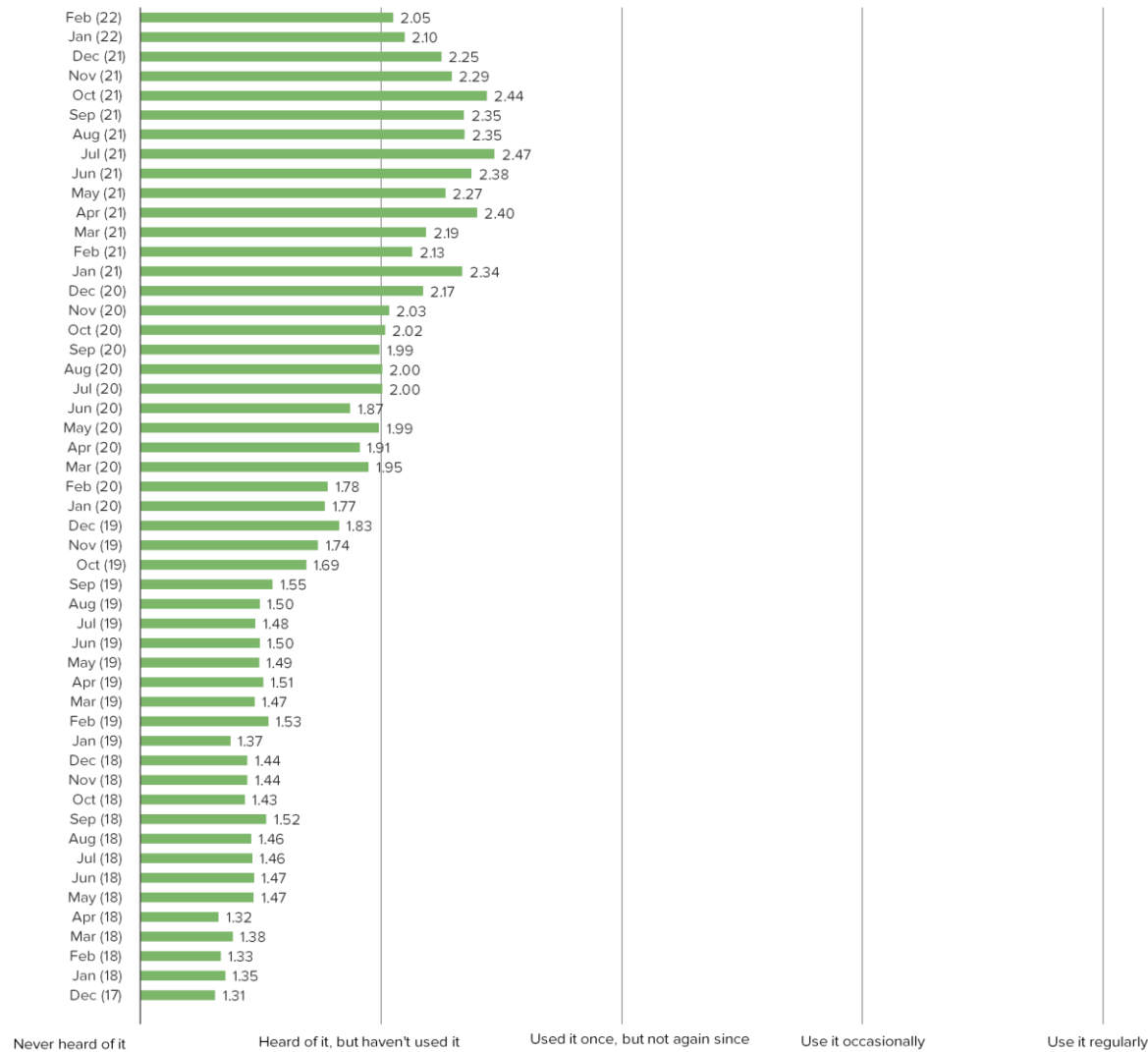
## Weighted Average



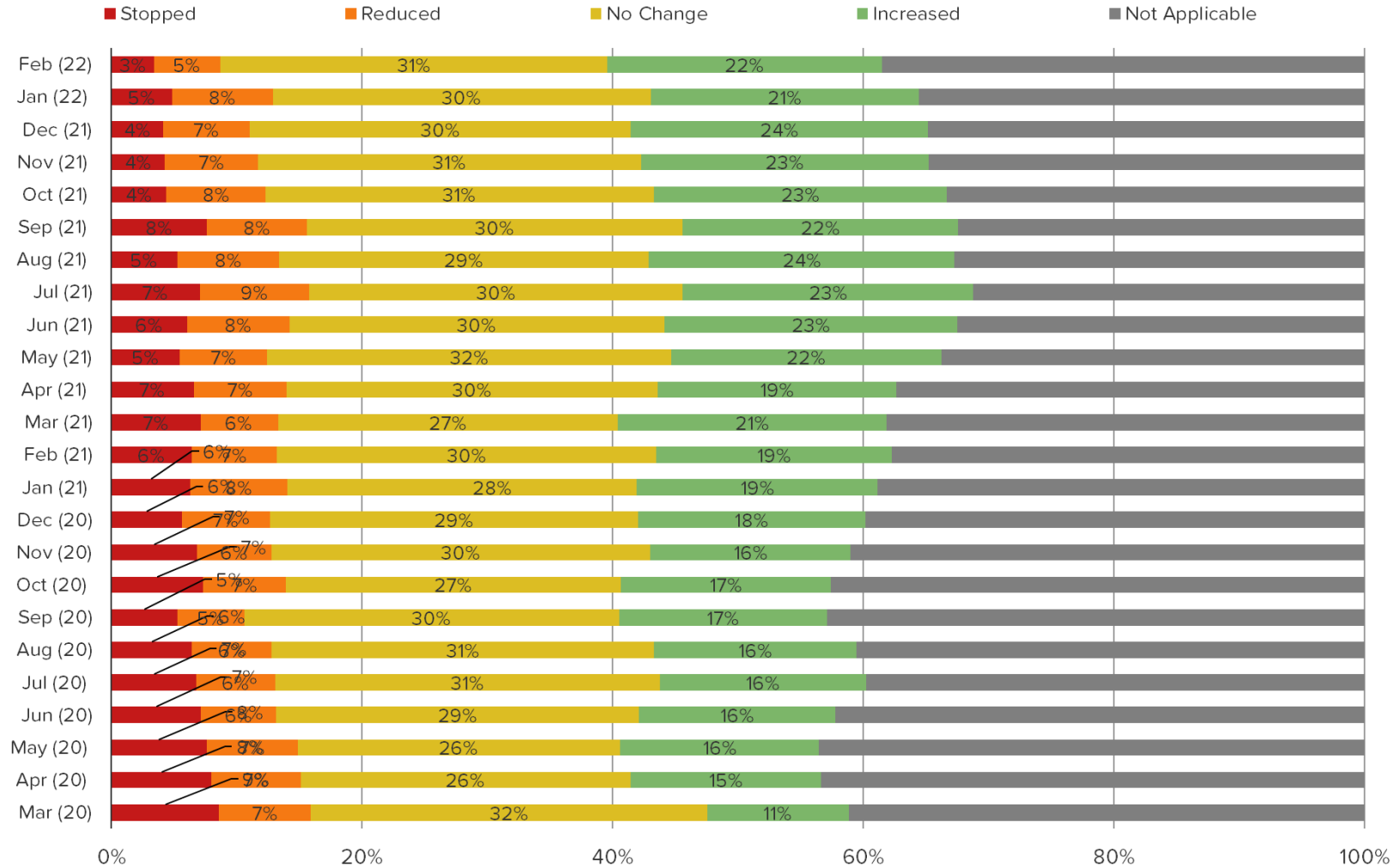
## What is your familiarity with Shipt?

*Posed to all respondents.*

### Weighted Average



**Have you changed how often you use grocery delivery (ie, Amazon Fresh, Whole Foods Delivery, Fresh Direct, etc) because of the Coronavirus and its impact to your life / the economy?**  
*Posed to all respondents*



## Going forward, do you expect to use grocery delivery (ie, Amazon Fresh, Whole Foods Delivery, Fresh Direct, etc) more or less often than normal because of the Coronavirus and its impact to your life / the economy?

*Posed to all respondents*

